THE ROLE OF SME-S ON TOURISM MARKETING – THE CASE OF ALBANIA

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Abstract:

Tourism is a priority sector in Albania. With its 13 % contribution to GDP and 233000 employed directly or indirectly annually, or 23,9 per cent of the total Albania jobs, it has become one of the most priority sectors promoted strongly even by the Government. Tourism marketing is always perceived as multi-parties effort toward a final aim, increase the country revenues. The efforts of the marketing are done from the Central Government, local Government as well as all single industry actors where the main role belongs to Tourism SME-s. This study aims to evidence the main techniques used by Tourism actors in Albania. It will also give suggestion to improve marketing techniques in order to increase efficiency and minimize the costs of useless marketing strategies followed by the above mentioned actors with emphasis to Tourism SME-s. It also gives recommendations on how the SME-s can improve their marketing performance in the market.

Keywords: Tourism, Marketing, SME-s

1.Tourism in Albania and its main actors

According to the World Travel and Tourism Council the direct contribution of Travel &Tourism to GDP is expected to be ALL99.8bn (7.6% of total GDP) in 2011, rising by 5.5% pa to ALL169.9bn (8.5%) in 2021 (in constant 2011 prices; the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry, is forecast to rise by 2.7% pa from 233,000 jobs (23.9% of total employment) in 2011 to 304,000 jobs (26.9%) by 2021.

Table 1: Tourism Contribution to GDP and Employment in Albania[1]

TOURISM	2011		
	ALL Lek bn	% of total	Growth
Direct Contribution to GDP	99.8	7.7	5.3
Total contribution to GDP	344.2	26.3	4.6
Direct contribution to employment[2]	67	6.8	3.8
Total contribution to employment	233	23.9	3.0

Tourism is another labor intensive economic sector that has a huge natural potential in the context of the development of Tourism in the Region.

Albania had no tourist industry until recent years. During the 90s' Albania, in particular the southern coastal areas and some archaeological and natural sites became a tourist destination for internal and international visitors, but at the same time the unsustainable exploitation of natural, coastal and marine areas has endangered local resources.

From '99 onwards there has been a tendency towards more modern tourism, with contemporary buildings, high quality services, attractions, resorts, etc. It's a period of

[1] Source: 2011, WTTC Report, Albania
[2] 000 jobs

differentiation and has contributed to tourist demand that results in a variety of supply, which pays attention to the environmental aspect.

Local government authorities and private sector actors are increasingly tempted to focus on mass tourism and, in some cases even, elite tourism. Nevertheless the short-term economic interests of landowners, real-estate developers and public administrators to exploit tourism generated incomes, may hamper the capacity to develop a long-term alternative and common vision for sustainable tourism.

Additionally tourist promotion activities are managed in an uncoordinated manner. Lacking real leadership in tourism marketing, these activities are mainly conducted by private operators, the municipal authorities and a small number of national and international travel agencies.

In fact, despite the opportunities that this country has to offer to investors to develop the sector, there are weaknesses that obstruct the expansion of the sector and that require immediate intervention. Two of these obstructions are more evident and are described below.

First of all the Albanian infrastructure is weak and needs improvement. Consequently accessibility to coastal areas from urban centers is difficult. As a it prevents a large proportion of tourist activities in the country.

Secondly, the lack of managerial experience in the field and the shortage of trained staff results in low quality of services in tourist areas. Human resources are an important element in the potential strength of the tourism sector. An improvement in the supply of labor would be an effective measure for strengthening the competitive position of a destination/country. So, training is needed not only at managerial levels, but also others levels. Since the tourism industry is labour intensive and tourism is by virtue high-contact, education and training would promote the extensive tourism resources possessed by Albania and could in fact enable diversification of the Albanian tourism offer.

2. Albanian Tourism Marketing Efforts

Albania entered a democracy only 20 years before. That time was established the Albanian Tourism Committee which task was to promote Albania as a travel destination. Tourism unfortunately was not considered as a priority at that time and therefore inadequacy of funds brought scarce and inefficient promotional materials which were limited to some brochures with scarce information about Albania. Poor state of infrastructure made even more difficult the marketing efforts. By the other side Tourism SME-s were new ones and still did not understood properly the role of marketing for their market survival.

The state limited to market the country only through participation in some Tourism Fairs which at that time were only two to three including ITB (Germany), WTO (UK), BIT (Italy). Tourism SME-s can profit the State stand through a lumpsum fee which for fragile SME-s sometimes was unbearable.

The political unrest of 1997 deteriorated the image of Albania and therefore the marketing of the country was more difficult. At the same time Tourism was still considering as a secondary option and the marketing remained at the same effort level as it was before.

The real attention to Tourism Marketing started after 2005. In 2006 was announced the first Tourism spot which was broadcasted by CNN.

The first spot though not very much effective, because of the wrong distribution channel which does not correspond properly to Albania's Tourism target markets, was the first effort toward the change of Albanian image.

Below are given different Albanian Tourism spots and their respective slogans which testify how in a few years Albania has changed its position in the Travel and Tourism markets.

Table 2: Change of Slogan and Mean of Communication of Albania Tourism Campaigns

Spot No.	Slogan	Broadcasted by
1	Albania – The last secret	CNN
2	Albania - New Mediterranean love	Euro News
3	Albania – Yours to discover	CNN, BBC
4	Albania – My passion	CNN, BBC

The spots and marketing efforts have brought a substantial increase in the number of Tourists in our country and of course in the structure of tourists. Thought regional Tourists have still increased their arrivals to Albania, it is substantially increased the number of Tourists arriving from Germany, Italy, UK even US or Japan.

Below is given the increase in the number of Tourists through years.

Table 3: Number of Visitors in Albania and their percentage of Increase through years

Year	2006	2007	2008	2009	2010
No of Visitors	926,056	1,098,765	1,330,138	1,786,045	2,302,899
% of increase (comparison with the preceding year)		18.6	17.4	34.3	28.9

According to the Ministry of Tourism, Culture, Youth and Sports during January – May 2011 have visited Albania 163393 foreign visitors more than in the same period of the previous year.

During this period the non resident visitors is increased by 40 per cent compared with the same period of 2010.

- 59852 ose 11% are transit visitors
- 507983 ose 89% are daily visitors or with more night stays.

It is obvious that the Marketing efforts and especially the means of communications have increased their efficiency though more efforts should be out on more effective communication means. It is obvious that the number of pleased visitors will result even in a greater number of arrivals if the visitors are pleased. This can also be reached through personal communication channels, word of mouth etc.

Albania though baby steps have moved toward an integrated approach concerning Tourism marketing. But the picture now it is quite different if we compare with the picture of 10 years before.

The main actors dealing with Tourism Marketing are given in the scheme below

Central Level	Local Level	Individual Business Level
Ministry of Tourism, Culture, Youth and Sports through Albanian Tourism Agency	Destination Marketing Organizations (only 1) Tourist Information Offices	Tourism SME-s belonging to - Hotels - Tour Operators or Travel Agencies

Analyzing the role of each segment in the scheme above we might say

Ministry of Tourism Culture Youth and Sports role for Marketing limits itself to:

a. Preparation of Stands in Different Fairs which now count more that 5 annually

b. Preparation of Promotional Materials (though in a very limited number) and variety concerning different Tourism forms that might be developed in Albania

c. Payment of stands in Fairs where Tourism operators can be part without any charge

d. Preparation if TV spots for Albanian Tourism (general ones) not specific and targeted ones yet

The Role of Local Government and DMO-s is limited to:

a. Preparation of maps and tourist information in a local level (most are printed materials)

b. Organization of local feasts or minor events to promote local culture and other values of the region.

Must be stated that we have only 1 DMO in Region of Korca.

The Role of Tourism SME is more concentrated on:

a. Preparation of very few informative materials concerning their establishments (case of Hotels and restaurants)

b. Information materials for the products or services the TO offers (case of TO or Travel Agency)

A greater role in Marketing of Tourism now is playing the increasing use of IT. Online booking of tours and trips is facilitating marketing efforts.

In a broader view Albania is creating its own brand concerning cultural tourism with its great representation of UNESCO protected values, such as Butrinti, Gjirokastra and Berat.

Saranda and the Riviera are also becoming distinguished brands in region concerning sun and sea tourism. Articles from Tourism writers all over the world are telling to worldwide travelers to come to Albania where they will find the "latest unspoiled beaches" in Europe.

Also in a ranking of 50 more authentic destinations worldwide Albania got two places as the overall country, so all of Albania and Gjirokastra has a specific place. There were no countries in the world represented twice in the ranking compared with Albania.

Lonely Planet advising 10 Top Destinations that should be visited in 2011 rank Albania as the first country that should be visited.

However, in recent years, the curve showing the number of foreign tourists has steadily risen. However the ratio of tourists and the population is lower when compared with other

countries of the Balkans: 1 tourist in every 6 people, while in Greece this ratio is 2 / 1; in Montenegro is 1 / 1, and Croatia is from 1.5 / 1.

3.Issues related to Albanian Tourism Marketing

a. Uncoordinated marketing efforts

Theoretically for promotion of different Tourist sites joint efforts between Government ands SMEs should be undertaken. Instead marketing is considered as as task of Albanian Government. Still relatively new in the market with a very high frequency of market failures, SME-s are often uncapable to fund Tourism marketing campaigns. Therefore they do whatever they can to promote their services which in many cases do not fall under country positioning or does not have the same topics as the national marketing campaigns. The gaps in advertising information often lead to a confusion of potential clients.

b. Inadequate funds allocated to Tourism Marketing

State has never proofed to be willing and able to allocate adequate financial resources to the promotion of Tourism in Albania. Many spots are funded through sponsorships of different foreign donors eventhough the state has claimed Tourism as one of its priorities. Funds barely support one TV spot, participation on fairs, and scarce printed informative materials.

c. SME-s still small and fragmented to pressure the state

Though grouped in organizations joint marketing efforts are not the priority of Tourism Business Associations. On contrary they intention is still to pressure the Government to pay more attention especially with regard to promotion components. One aspects that is not successfully regarded from the Government is to call advisory business representatives for its marketing campaigns. SME-s of tourism still suffer from unfair competition and can hardly find a common consent on major marketing issues.

d. Repeatedness of images of slogans

The originality of initial positioning through slogans like „Albania – the last secret“ is at oresent followed by Albania – My passion which is not original and overlaps with the same slogan used by Colombia a few years before. Repeatedness of slogans not onkly will helo Albania find its place in the worldwide Tourism markets but will obstacle more the positive image it is trying to build.

e. Distribution channels involve domestic SME-s, rarely linked with regional ones

This is more a problem more concerning joint regional markrting efforts. Being in conditions of relatively small gepgraphic areas and aiming overseas market which must be more interested in regional products Tourism SMEs rarely link to neighbouring country Sne;s to promote joint products. Still there is a big rate of individual efforts concerning marketing and promotion.

f. Establishment of brand destinations is still weak and culture based

Efforts to create brand destinations are still scarce and donor dependent. Albania has many sites or cities which are world cultural patrimony protected by UNESCO and as such they are widely promoted or cited only for this. They have a fragile brand merely linked with UNESCO efforts to promote its historical values but there are scarce efforts from both business and Government level to create a brand identity for those distincted sites.

g. Target markets should include more regional markets

We expresssed earlier that there are Tourism SMEs often take part in big events such as ITB or WTO. Unfortunately being in those events Albanian Travel Agencies or TO migh bind succesful contracts but Albania has not enough accommodation capacities to welcome number of visitor groups which number can reach even 100 persons. Therefore it is not quite efficient the promotion of Albanian Tourism products in such big events. Rather than this we should concentrate more on two options

First is participation in regionale events (fairs) that might have smaller scale of tourists but extended thoughout the year and promoting a better and more competitive product

Second, for the specialized TO or Travel Agencies is that they should participate in specific fairs such as RDA Germany and so on. This was it is increased the efficiency of marketing efforts.

4. Reccommendations on how Tourism SME-s can enhance their marketing performance in their destinations

First: Successful tourism destinations must have SME cooperating and coordinating both their activities even through organisms, formal or informal entities created for this purpose.

The creation of common goals, practices and brand attributes relies on communication between the destination's 'business units'. Since these are usually independently owned SMEs in competition with each other, managers have to develop communication strategies and practices to overcome these obstacles as they relate to the boundaries of the firm (Stigler 1951); Picot, Reichwald and Wiegand 2001). If a destination is treated as an SBU the boundaries between firms must necessarily become less rigid, facilitating (voluntary and involuntary) exchange of knowledge, technologies and other resources. A further issue that often poses as an obstacle relates to the managerial influence on brands for geographical locations, rather than manufactured products. To help create options for solving the implied difficulties it is assumed that, if we analyse the dynamics of tourism production processes at destinations, we may gain insights into the function of individual SMEs, and how interaction between destination SMEs can be best facilitated. The ensuing discussion will then be linked to the role and opportunities that come with branding destinations.

The Destination

Tourism destinations can be divided at least in two different types, those that are vertically integrated, and those that are put together as a necessity of the destination purpose.

Different management techniques apply of both destination forms. Thus management in vertically integrated places is more hierarchical (top to bottom) whereas in the second type is more flat but since fragmented more efforts should be put on the coordination of all the actors to achieve the common goal.

Examples of Albania in fact testify that in general Albania is not e good example of the first integrated destination but there are enough good examples of the second type striving to coordinate activities often not successfully. Therefore either a coordination budy should take the coordinating role and more integrated and consistent marketing efforts should take place for a tourism destination.

Conversely, freely assembled destinations are comprised of a number of SMEs that cater for tourists. Randomly they might come from primary services such as transport, accommodation to to Tourism service providers. As the destination matures, the turnover of the SME increases its share from tourists and the company begins to actively market its services to them. Subsequently, dedicated tourism businesses may be set up and competition amongst SMEs intensifies. One destination in its development phase tries to look as complete and unique with a lot of attractions, but tourist might be disappointed once they arrived at such destination. Rather than positioning an SME according to a destination theme or befitting the brand, internal competition and opportunistic management chooses to ignore the destination brand and causes its dilution. It is obvious that such lack of commonalities poses managerial obstacles for the flow of knowledge, influencing value-for-money relationships across the destination, quality control and product development, all of which affect the competitive strength of the destination.

Second 2: In order to be more successful the tourism destinations must have SMEs collaborating and networking on internal (destination) marketing issues. This is a must but still it is an issue because the product of Tourism is not created by only one SME. It is a product created between many SME partners with differing business cultures. Only one SME provides only one part of the product. The oeverall tourist experience is created by many actors as Tourist perception.

Especially for free individual travellers which are growing in last years, the director of one airline for instance is not aware of who might be the other provider (e.g. attraction). The question is that whom should the manager contact if they do not see or perceive the „channel“?

The case is similar with semi-packaged tourists but largely avoided for totally packaged tourists, as the tour-operator constructs the service chain. The operator has thus some control over product fit and quality and can even be instrumental in the creation of communication links between the facilitating SMEs. In the majority of cases, however, the ‘path’ which the tourist follows as s/he moves through the destination from one service provider to the next (Bieger 2002) is out of each manager’s control. In essence, then, the individual SME- manager cannot ‘see’ nor control the ‘path’, i.e. the production process and place, as it is hidden from view once the tourist leaves his premises. While there usually exists some tenuous knowledge why tourists come to the destination, the question must be how the consumption of the destination in general, and the focal SME’s services in particular, fit into visitors’ travel life-style.

Indeed, it is the individual travellers who generate the product when assembling the services they demand. As they move through the destination, tourists ‘beat a path’ while ‘picking and choosing’ from what the destination offers. The tourist thus creates a value-chain him/herself. For the SME, the resulting customer interactions are therefore more transactional than relational because the SME manager does not ‘see’ the tourist’s path through the destination but has to rely on unknown ‘channel members’ to produce services of commensurate price and quality while selling the destination experience as a whole.

Third : Successful destinations have SMEs that are more motivated to gain better knowledge of and try to control more of the tourists’ path through the destination than less successful destinations. This materialises in SME’s interest in alliances, consumer research, and in facilities such as recommendation and referral systems, and loyalty schemes.

Destinations as Virtual Firms

A less than perfect understanding of how tourists perceive destinations and of the path they would like best while passing through the destination, may be considered the reason for the prevailing assumption that services have only short distribution channels. When surveying service management and marketing textbooks (e.g.(Lovelock 2001; Zeithaml 2003) and even frequently cited tourism marketing textbooks (e.g.(McIntosh 1995), service distribution channels consist mainly of a supplier, sometimes intermediaries, the service firm itself, and the customer.

At least for tourism, this perception is myopic (Levitt 1960). The 'short version' of the distribution channel does not reflect nor get anywhere near the holistic nature of the tourism product as perceived by the tourist. Since the product is created *between* SMEs, rather than by just one firm, there appears a channel of sorts in the form of what has been called a path or a chain of businesses. Whereas a manufactured product reaches the consumer at the end of the channel, tourists' needs and demands are satisfied along the path, as well as overall. It is therefore both the process of the various service experiences (conceived of as a chain) and the experience overall (as the outcome of the total channel's effort) that delivers the holiday product. The essential point is here that all experiences at a successful destination have something in common; they generate something *between* themselves that amounts to causes for holiday satisfaction with a destination. Once tourists begin to experience and accept the services on offer as part of the 'destination experience', it becomes easy to conceive of the tourism destination as a virtual service firm (VSF).

From an institutional point of view, a virtual organization is a network of enterprises, which are using resources jointly and which organize their cooperation in a joint effort.

Viewing a destination as a virtual service firm (VSF) has a number of advantages.

Firstly, this approach creates conceptual substance and structure for the destination as an SBU, as we simply recognise the appearance of a common product (attribute) over and above its functional services that are delivered by the SMEs involved. Secondly, on the basis of an identified substance or product attribute, the determination of specific management skills and processes , customer research requirements to target the right markets, and competitors' strengths and weaknesses can be structured and organised. Thirdly, both product and market intelligence form the basis for the expansion of distinct competitive advantages.

If we consider the virtual tourism firm initially, as an ideal type, it consists of the four key-service providers or tourism facilitators (attraction, transport, accommodation and hospitality). In contrast to a virtual manufacturing firm which has one focal company *actively* organising other firms for the length of a project, management in virtual tourism firms are often *passive*, because it is the tourist who comes to the destination and assembles the firm.

In this scenario the tourist alone creates his/her value-chain. As tourism destinations grow, they offer various options of such virtual firms. Consequently, there may be one tourist-created cluster of SMEs forming one Virtual Service Firm, while another cluster forms a different Virtual Service Firm. It may thus occur that, as an example of several options, one SME belongs to two or more, different clusters while all the other SMEs in these different clusters belong to only one tourist-created cluster. The tacit knowledge of common product attributes created between these members, and the members in different clusters of the virtual firm will be the result as well as the substance of contacts between SMEs. They are part of what Marshall called 'industrial atmosphere' (Marshall 1920). The way the destination networks develop may have a substantial influence on this atmosphere and how it affects the growth of the destination.

Fourth 4: In successful Tourism destinations, principal SMEs belong to more than one Virtual Service Firm and communicate more frequently with other members and on a greater variety of subjects and issues than less successful destinations. These exchanges may have a greater influence on destination-internal marketing strategies and tend to drive the development and specialisation of clusters of tourism SMEs (Porter 2000) or even full Virtual Service Firms (i.e. containing members from all key-services).

The more destinations are conscious of the type of virtual firms tourists like to assemble, and the more these SMEs communicate and interact, the more are they likely to satisfy their customers. Such success leads to cuts in transaction costs (economics of scale), sharing resources, and openly discussing further strategies of cooperation. Destinations can thus assume many of the advantages industrial or regional clusters can generate (see Porter 2000; Marshall 1920).

Fifth: Successful destinations have more networking clusters of SMEs who know about the 'paths' their tourist segments take through the destination than less successful destinations. In other words more successful clusters seek to form virtual firms with systems of recommendations and referral, based on perceptions of similarity or compatibility of price and quality as seen compatible with their target market. Business clusters may therefore be distinguished and grouped according to what type of experience they provide and/or who they target. Given this differentiation, destinations comprise clusters of SMEs forming virtual service firms without common management but with common targets and goals. Yet as much as the individual SME may try and improve its service, it can never be absolutely sure that the other cluster member is working as hard to achieve product quality and satisfaction. What it boils down to is that …

Sixth: Successful destinations exhibit higher levels of trust not only within but also between the various clusters compared to less successful destinations.

Destination Brands and their Roles

Destinations develop their own brands very much for the same reasons as the manufacturing sector. They help identify and distinguish the company's offering over time and represent both a promise and experience for current and future products. The conceptual basis of this homological function of brands for individual companies and destinations lies with the fact that destinations can be conceived of as virtual firms that create the holiday experience as its product.

There are some important differences between product and destination brands. They relate mostly to history, substance and ownership. Whereas a product brand is under complete management control regarding complexity, design and ownership, a destination brand for a geographical location is often related to a history and physical features that cannot be altered. Also, there may be ethical issues involved in as much as a destination brand seeks to represent its inhabitants. It follows that destination marketers who try to create a brand that would also cover its living culture and people, need to make sure that these people are consulted and feel comfortable with the brand. A further reason to make sure that the resident population is happy with the brand is because some of their personality is often part of it. As citizens and ratepayers, they are usually co-owners and could thus, potentially, interfere in its design and features which may create uncertainty in the market place as to what the brand is all about.

Seventh: Successful destinations have more SMEs that are aware of the destination's brand attributes than less successful destinations, and are more intent on expressing these attributes in all of their communications and interactions. Successful destinations also know about the various levels of brand attributes that need to be linked to its services. They are the functional level (e.g. has the VFS accommodation available?), the experiential (e.g. is the bed comfortable, or the air crisp as promised?) and the expressive or symbolic levels (e.g. is the bed made out of native timber in a room with a view that is uplifting and getting the visitor in touch with nature?). If a destination and its SMEs manage to produce a service experience at all of these levels, and all of the attributes are clearly linked to the destination, the resort creates both the highest levels of satisfaction and a unique competitive advantage (Gnoth 2002).

Eighth: SME brands in successful tourism destinations are recognised by tourists to have more attributes in common with the destination brand, and have the house-brand's attributes fit better with destination attributes than less successful destinations.

The reasons for developing cooperation between SMEs at resorts are, initially, to gain guidance and help for their external communication but closely followed by the need for internal development and consistency. However, the litmus test of the success of the destination brand and its virtual firms is the extent to which they satisfy the tourist.

As stated in the initial paragraphs, tourism represents 'life away from home'. The demand for services thus either replicates or contrasts life at home, or changes between these poles, depending on the 'role' tourists like to play (Adler 1989). For to produce the optimal service, it requires clusters of SMEs comprising distinct Virtual Service Firms that maintain a close fit with the travel-life style of its customers.

This means that, successful clusters have formed actively, contain close contact, exchange information frequently, and have not only destination brand attributes but also cluster-specific attributes in common. The active formation of a cluster is in response to market research and the desire to cooperate with those businesses that fit best both, the targeted customer and the resources of the SME.

5.Conclusions

The analysis of the destination system as a virtual service firm has allowed us to structure the tourism production system. The product is created by discrete organisations who are increasingly more successful, the more their own brand fits that of the destination. The growth of the destination brand is thus intertwined with the development of the SME's house-brand.

The development of the destination brand depends largely on SMEs' capacity to communicate with each other and overcome the obstacles of their competition on the ground. One way in which this can be organised is by actively developing clusters of businesses into virtual service firms that match the tourist segment's ideal travel life style. The notion of the VSF is very helpful here because the more the destination finds itself unable to generate open and productive communication channels that lead to innovations and improvements in customer satisfaction, the more is the tourist left to his own devices and continues creating his own value-chain.

The exploitation and improvement of the destination's value-chain is therefore closely intertwined with the creation of the ideal value-chain for the tourist. As indicated in the sequence of the propositions, the more efficient the destination development, the more important is the integration of the tourist's entire travel life style into the design.

Simultaneously, it is the same device by which SMEs get away from direct competition and the threat of looming price wars, because they differentiate and begin to target differing markets, making cooperation so much easier.

It is therefore surprising that, to date, there is no research that attempts to analyse and match the value-chains tourists ideally like to create with the value-chains that tourism SMEs are forming so that they become more alike. The recommendations presented here are hoped to establish a basis for such a development.

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